FPAM WORKSHOP OUTLINE

Title: **Evaluate Your Clients Insurance Policies**
Date: 27 July 2019, Saturday (Full day)
Venue: Rafflesia 1, Sime Darby Convention Centre
Points: 10 CPE Points / 10 CE Points / 8 CPD Points
Facilitator: Ms Irene Lee Yoke Leng

Learning Outcome

Participants will be able to:

1. Identify the different types of insurance plans and how it meant to the planner
2. Analyze the different companies policy documents and ascertain it applies to your client situation
3. Identify the important information when evaluating your client's policies
4. Recommend when to preserve or cancel the policy

Learning Outline

Time	Detail
8:30 - 9:00 am	**Registration**
9:00 - 9:45 am	**Different insurance plan & its applications** • Investment Link, Traditional Life, Term, Standalone medical plan, CI, early CI
9:45 – 10:30 am	**Reading different companies plan** • This session will help to understand different companies policies details which is important to the clients planning
10:30 – 10:45 am	**Coffee Break**
11:30 – 1:00 pm	**Planning for medical insurance-case study** • Standalone or Investment Link • Top up policies • Groups presentation
1:00 - 2:00 pm	**Lunch Break**

2:00 - 3:30 pm	**Essential information you need from your client** • Standalone or Investment Link • Top up policies • Groups presentation **CASE STUDY** - Evaluate and take appropriate action
3:30 - 3:45 pm	**Coffee Break**
3:45 - 430 pm	**Groups Presentation and discussion** Each group will present their recommendation and why Group discussion on the each recommendation.
430pm - 5:00 pm	**Review & Recap** Important of review Let's Recap
5.00pm – 5.30pm	**Q & A**

Profile of Ms. Irene Lee, FChFp, RFP, ChLP

Irene has being in the Financial Business for more than 20 years. She started in the Insurance industries and moved on to related fields in the financial arena to work more effectively for her clients. She holds a CMSR License and she write financial plans for her clients.

She contributes articles to The Edge weekly under Personal Wealth section. She's invited to give talks at TAR College to the undergraduates on financial planning. She also does retirement planning talk for CIMB bank staff and helps them to have an overview of their retirement situation. To her planning is a blueprint to success.

CE WORKSHOP REGISTRATION FORM / INVOICE

Title of Workshop:	**Evaluate Your Clients Insurance Policies**
Facilitators:	Ms Irene Lee Yoke Leng
Date:	27 July 2019 / Saturday [full day]
Venue:	Rafflesia 1, Sime Darby Convention Centre
Registration:	8.30 am – 9.00 am
Time:	9.00 am – 5.30 pm
Fees:	**Early Bird Special; RM285 (FPAM Member), RM405 (Non-members) Payment by 19th July 2019.** Normal – RM 325 (FPAM Member), RM 455 (Non-members) The fee includes workshop materials, lunch and refreshments.
CE Points (FPAM): CPE Points (SIDC): CPD Points (FIMM):	Ten (10) Ten (10) Eight (8)
Instructions:	Please fill-up this form and fax to +603 7954 9400 or e-mail to events@fpam.org.my **by 19th July 2019 for early bird rate.**
Payment/Invoice:	**By cheque:** Payable to 'Financial Planning Association of Malaysia'. Address: Unit 305, Block A, Phileo Damansara I, Jalan 16/11, off Jalan Damansara, 46350 Petaling Jaya, Selangor. **By credit card:** We will process and charge your credit card upon receipt of this form. This page serves as our official invoice. No further invoice will be issued.
Enquiries:	Send e-mail to events@fpam.org.my or call Sabria at +603 7954 9500
Terms:	Registration is on a first-come-first-served basis. Confirmation is subject to payment before the course. Walk-in participant/s will be admitted on the basis of space availability. FPAM reserves the right to amend the program, speaker, date, venue, etc, without prior notice.

YES, PLEASE REGISTER ME!

Name:			
IC No.:		FPAM No. :	
Company& Address:			
E-mail:		Telephone:	
SC Licence / ERP No:		Mobile:	
Contact Person:		Telephone:	

Mode of Payment

By cash, please bank into **Alliance Bank A/C 1210 9001 0005 395** and email or fax in bank-in slip
Cheque payable to **Financial Planning Association of Malaysia**. Cheque no.: Amount: RM
Charge my credit card: ☐Visa ☐Mastercard ☐Amex ☐Diners Credit card no.: Expiry date: Amount :
Early Bird Special – By 19th July 2019 / Closing Date 26th July 2019

EMAIL: events@fpam.org.my / FAX: +603 7954 9400